# apptoto

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# PRESS KIT

Contact: media@apptoto.com

Your calendar's best friend!

## apptoto

Auto Messages **ON** | Help ▾ rece

| Agenda | Month | Week | Day |

Enter search | ◢ Compose | ⬇ Imp

| Appointment info | Participant info |

**Thursday, January 24, 2019**

☐ 📅 9:00 am [CONFIRMED] Consultation | 👤 Matthew Schaberg matt@ap

☐ 📅 12:00 pm [NOT COMING] On-site Meeting | 👤 Joe Albowicz (650) 555-121

**Friday, January 25, 2019**

☐ 📅 9:00 am [1/2 CONFIRMED] Meeting | 👤 Rachael Cort (650) 501-9988

☐ | 👤 Fred Smith 925-361-8318 fr

📅 11:00 am Personal Appointment

**Monday, January 28, 2019**

☐ 📅 10:00 am [CONFIRMED] Initial Meeting | 👤 Fred Smith 925-361-8318 fr

☐ 📅 11:00 am Followup Meeting | 👤 Fred Jones 925-555-8080 fr

☐ 📅 2:00 pm [CONFIRMED] Design Meeting | 👤 Rachael Jones 541-382-187

☐ 📅 3:00 pm [RESCHEDULE] Ann... | 👤 Jessica Thane 650-523-2342

| Jan | 2019 |

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

Go to today | tomorrow

Calendars ( all )

☑ 📅 Frank Cort
☑ 📅 NY Office (Eastern)
☑ 📅 Sam Smith
☑ 📅 SF Office (Pacific)

➕ Connect Calendar

# OVERVIEW

## Appointment Messaging and Scheduling Platform

Apptoto extracts contacts from your calendar and automatically sends appointment reminders and confirmations to ensure your clients arrive at your office on-time and prepared. It can also send follow-ups to ensure they keep coming back!



*Pronounced "App-toh-toh" (like the dog)*

We've been waging war against no-shows and increasing repeat business since 2010 through automated appointment messaging and scheduling. Over 3,000 businesses in 90 countries rely on Apptoto on a daily basis to send accurate and timely messages. We've seen first hand what the impact of a well crafted appointment messaging strategy can be on appointment based businesses and it can be transformative. Apptoto's vision is to create an easy to use, and affordable, automated appointment messaging system that works with your existing calendar, CRM, and scheduling software in order to grow your revenue AND your profits.



Frank Cort,
Founder

## Message from the founder:

*Hi, I'm Frank Cort, Apptoto founder. My career began as a software programmer with Xobni and Yahoo, where I focused on the creation of email data-mining software. As a serial entrepreneur, I have always identified with professionals trying to improve, manage, and grow their business. In 2010 I created Apptoto when I saw an opportunity to help a local business owner improve the efficiency of his business through appointment messaging automation.*
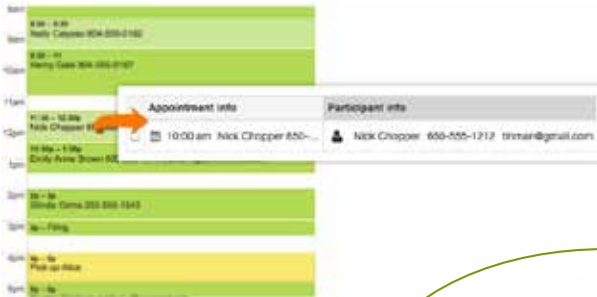
*Since this time, my focus has been to simplify and automate messaging and scheduling for appointment-based professionals by reducing no-shows, decreasing costs, and increasing both revenue and profit.*

# HOW IT WORKS

**1** Connect Apptoto to your calendar to create your reminder messages and schedule.

**2** Apptoto automatically extracts your client's contact information from your calendar.

**3** Set up your message reminder content and reminder schedule.

**4** Apptoto reminds your clients and they confirm their appointments. Select from SMS text, email, or voice reminders.

**5** Apptoto automatically updates your calendar.

## MONTHLY PRICING PLANS FROM $29
### NO LONG TERM CONTRACTS REQUIRED

# ONLINE BOOKING

Google Calendar™ integration    Office 365 integration    Clio    Salesforce integration    Microsoft Exchange

Allow your clients to book appointments with you (or your team) online and from their mobile devices. Capture all the information you need to make the appointment successful. Appointments are created directly on your calendar. Fully integrated with Apptoto's messaging platform!

## Custom Url

Choose a custom url that you can send to anyone that requests a time to meet... or you can link to your booking page directly from your own website.

Your booking page is fully customizable.

## Mobile Friendly

Apptoto's Online Booking Pages look great on any device. Clients can easily book with you from where ever they are.

## Appointment Types

Let your clients choose what type of appointment they would like to book with you.

Different booking configurations can be used for each type of appointment.

## Or add it to your website

Alternatively, you can embed Apptoto's Online Booking page on your website and allow clients to book appointments with you directly from your website!

## Availability Options

You have complete control over when you appear to be busy and when clients can book with you.

You can also control what times are available directly from your existing calendar.

# ONLINE BOOKING

## Custom Fields

Apptoto can be configured to ask your clients and prospects customized questions when they book appointments.

Use the information collected during booking directly in the messages sent to clients and staff members through Apptoto's messaging platform.

## Multiple Calendar Support

One booking page can represent multiple calendars. New appointments can always be added to one calendar, or they can be multiple calendars in a round-robin fashion, allowing you to have one place for clients to book across all of your office and staff members.

## Time Zone Support

Time zones are handled seamlessly. Clients see available times in their timezone and their timezone is captured upon booking. Apptoto's messaging platform can then properly send messages with the correct time to clients.

## Address Book Integration

Clients and prospects that book appointments with you are automatically added back to your chosen Address Book (all address book types supported, including Salesforce, Google, Office 365)

## Capture Mobile Numbers

Apptoto's Online Booking pages default to capturing your client's mobile number for authentication purposes. This ensures the client or prospect is real, and it ensures that Apptoto's messaging platform will have access to their mobile number to send SMS/Text messages reliably!

## Automatic Messaging

Appointments booked through the Online Booking system AND appointments that you create on your calendar by hand can be automatically reminded and sent follow-ups through Apptoto's Messaging Platform. Supports Email, Text, and Voice calls!

# INTEGRATIONS

Apptoto integrates with multiple calendars.
Is your system not listed? We'll build an integration for you!

Google Calendar™ integration

Outlook Calendar™ integration

Office 365 integration

iCloud™ integration

Microsoft Exchange

Salesforce integration

Clio

CSV / XML

SQL Databases

iCalendar, CalDAV, CardDAV integration

EMR / EHR Systems

# CLIENT TESTIMONIALS

*We didn't think we could afford a reminder service, but our overall Apptoto experience has shown us that we can't afford not to have it.*

Jeffrey Katz
JDKatz: Attorneys at Law

*Apptoto is a valuable service for our business and I would highly recommend it to anyone needing a reminder service. No shows are practically extinct since Apptoto and our customers seem to appreciate the reminders as well. Apptoto is clearly a win/win for us and the customer support far exceeded our expectations.*

Bobby Eaton
Redi-Box

*Apptoto is the must have application for any professional. We all know the frustration of missing appointments on both ends. Apptoto has not only decreased scheduling confusion, it has eliminated it. It has also eliminated the staff support and expenses required to maintain the schedule. The service is an incredible value.*

Steve Nenninger
Steve Nenninger, N.M.D.

*The Apptoto reminder service has made a huge difference to my practice... my "no-show" rate is almost non-existent. Last year I only had 1 "no-show" and it turned out to be the only person all year who declined to allow me to send them a reminder! I wish I'd signed up for this years ago!!*

Nancy Cable
Nancy Cable, LICSW

# FEATURES



## HIPAA COMPLIANCE

HIPAA Compliance is available for some subscription plans, and includes:

⭐ Account stored and run on HITRUST Certified servers for HIPAA Compliance (provided by Firehost)

⭐ All sensitive "at rest" data encrypted

⭐ All sensitive "in transit" data encrypted (this does not include SMS and Email messages sent)

⭐ Logging disabled on server

⭐ SSL used for all communication

⭐ Account disabled after 6 failed attempts

⭐ Courtesy compliance review of message content

⭐ Signed Business Associates Agreement (Group plan and higher)

## MULTILINGUAL MESSAGING

You can create multiple "Message Templates" that are triggered based off of the content of the appointment. One common use of this is to send reminders in Spanish to Spanish speaking clients.
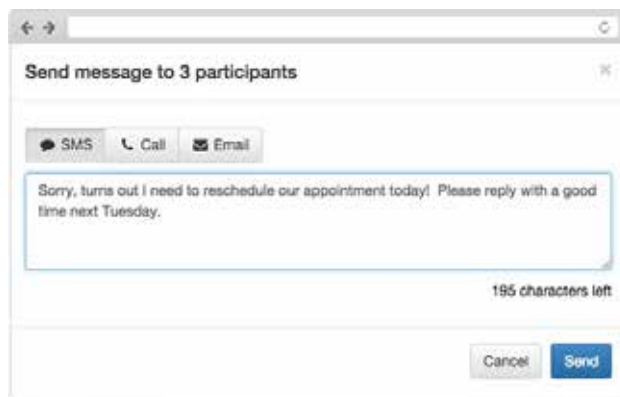
# FEATURES



## TWO-WAY CONVERSATIONS

Easily respond to your clients from the Apptoto website or directly from our real-time email notifications. Your clients will love that there is an actual person on the other end of the messages they receive from you!

## ONE TIME MESSAGES

"One Time Messages" can be sent to one or more clients/patients easily. This allows you to easily message all of your clients on a particular day at once. For example, you can send a message to all of your clients saying you need to reschedule their appointments.



## AUTO REPLIES / ACTIONS

Automatically respond and take action when your clients reply to messages. For example, you can respond with a custom thank you message when clients confirm, or send a notification to a staff member when clients respond with certain responses.



SEE FULL FEATURE LIST

# NEWS & HIGHLIGHTS

## What is Apptoto?

Tyler Blair has been an account executive/support specialist with Apptoto for almost three years now. Recently he was interviewed for a podcast on Maximum Lawyer's website by Jim Hacking. Tyler does a great job explaining Apptoto and the basics of how it works! | **LISTEN TO THE PODCAST**

## Put Your Clients at Ease with Easy Online Scheduling

As professionals, we're always striving to perform at peak level for our clients. We stay up to date on innovations in our field, we attend lectures and conferences, and we do our best to create an ideal atmosphere for the service we're providing. Whether it's providing state-of-the-art technologies or just making sure they have a comfortable place to sit, thinking about our patients and clients' needs is a cornerstone of business. | **READ MORE**

## The 5 Best Apps for Small Business Owners

With at-your-fingertips access to everything from shopping to medical services, the modern business landscape is all about efficiency and customer service.

To help you choose the right digital blend for your needs, we've put together this quick list of services to consider. Here are the top five essential apps and software your small business should consider to be organized and thrive in this on-demand era of service and performance. | **READ MORE**

## Tracking Time Using Text Reminders and Your Calendar

Did you know that Apptoto reminders can be used for time tracking of employees or clients? This is just another innovative way we have seen Apptoto being customized to fit some of our customers' needs! | **READ MORE**

**READ OUR BLOG**

# VIDEOS & WEBINARS

**10 minute demo of Apptoto's appointment reminder app**

**How to Use Search in Apptoto**

**How to Use Apptoto as a Communication Tool**

**Apptoto: Sign Up Pages**

**Getting Started Webinar with Apptoto**

**Sending some reminders in Spanish and some in English using Apptoto**

**Quick demo of Apptoto and Outlook**

**Syncing a Shared Outlook Calendar with Apptoto**

**How to create Automatic Appointment Reminders for Google Calendar with Apptoto**

CLICK THE TITLE TO WATCH THE VIDEO

## New to Apptoto?

If you're new to Apptoto then we encourage you to register for our next upcoming "Meet Apptoto" webinar.

WEBINAR CALENDAR

# FAQ'S

## 1. How does Apptoto know who to call or SMS?

Apptoto reads your calendar and looks for upcoming appointments that have phone numbers including area code in the title or body. e.g. "Fred 9254111212" or "Wilma (925)-411-1212". If it finds an appointment with a phone number then it will automatically call/sms that person based on the schedule you define (by default it will call the day before the appointment).

Apptoto can also pull phone numbers from your address book.

## 2. What if one of my clients doesn't want to receive SMS messages, or voice calls, or emails?

You can include [NOSMS], [NOCALL], or [NOEMAIL] in the appointment.

Alternatively, if you have your address book connected to Apptoto, you can include [NOSMS], [NOCALL], and/or [NOEMAIL] in the notes section of the contact notes. That way any future appointments with that contact will use his/her preferences.

You can also specify the contacts preference on the "Contacts" tab by clicking "Edit" on that contact and setting the preferences at the bottom of the Contact Edit screen.

## 3. Is my calendar safe with Apptoto?

Yes, Apptoto maintains secure access to your calendar and will never remove data. It will update your calendar entries for you when your clients confirm/cancel appointments, but you can turn this off if you'd prefer. Apptoto will also never share your calendar data with any 3rd parties.

## 4. What type of messages can Apptoto send?

We support SMS, Email, and Voice call messages. Voice calls can appear to come from your caller ID and the client can hear your voice.

# FAQ'S

### 5. What if I don't want to send SMS, Email, and Voice call messages?

You can configure which messages are sent by default on the "Messages" tab. You can also control which messages are sent for each appointment.

### 6. What are Reminder Messages?

In Apptoto, "Reminder Messages" are messages that are sent before an appointment takes place. Timing is relative to the start time of the appointment. E.g. a reminder message is a message that is sent 1 day before the appointment. Apptoto reminder messages can optionally prompt the client to confirm, cancel, or request a rescheduling.

### 7. What are Booking Confirmations Messages?

In Apptoto, "Booking Confirmations" are messages that are sent shortly after the appointment is booked. They can optionally ask the client to accept or decline the appointment. They can also encourage the client to add the appointment to their calendar with customized event information.

### 8. What are Follow-up Messages?

In Apptoto, "Follow-up Messages" are messages sent after an appointment. The timing of the message is relative to the end time of the appointment. E.g. you can configure a follow-up message to be sent 1 hour the end of the appointment asking the client to book their next appointment.

### 9. Will messages be sent automatically when I first sign up?

No, the "Auto Messages" feature is turned off.

### 10. What is the "Auto Messages" feature?

By turning on "Auto Messages", Apptoto will schedule messages to be sent for appointment that it finds phone numbers and/or email addresses in. Only the messages that are enabled on the "Messages" tab will be automatically scheduled.

EXPLORE MORE FAQS

# [CASE STUDY: JDKATZ ATTORNEYS AT LAW]

Welcome to JDKatz, P.C. (www.jdkatz.com), a Bethesda, Maryland-based award-winning law firm which grosses over $1 M in annual revenue. JDKatz comprises attorneys, CPAs, JD/LLM's and support staff and advises clients in the areas of tax, estate planning, real estate, corporate and litigation. Their clients span C-level executives to retirees and the aged. The firm seeks to communicate their values of trustworthiness, fidelity, care for their clients, and consistent performance in every interaction.

## [OVERVIEW]

JDKatz indentified the demonstration of trustworthiness from the outset of the client relationship as key. While many law firms set a goal to make their clients feel cared for, they often lack the infrastructure to consistently convey care and concern.

The first opportunity to communicate care for clients after taking the appointment is the appointment reminder. This simple act of kindness was fraught with unanticipated pitfalls. Reminder calls were often missed, and when they did connect, clients often feared they were being billed for the personal reminder (they weren't). The result was late or missed appointments and lost office time chasing clients for rescheduling and giving directions or other information.

Founder Jeffrey Katz persevered. Jeffrey evaluated software that would automate the reminder and work with ScheduleOnce, Outlook and Google™ calendars at a reasonable price.

He chose Apptoto.

## [REQUIREMENTS]

### [Versatile so it serves all clients]

Apptoto sends reminders by voice, SMS text, or email. 15-20% of JDKatz' clients are elderly clients who do not have email. Many do have cell phones and appreciate the text or the voice reminder.

### [Easy to use]

Apptoto is easy to use; the system is intuitive. JDKatz set it up to work with the Google™ calendar application in 15 minutes.

### [Customizable reminder scheduling]

For JDKatz, text messaging has been most effective, with a couple of reminders scheduled. The last reminder is sent 30 minutes before the appointment and contains parking directions on a web page link.

### [Seamless integration]

Apptoto schedules reminders for multiple calendars to serve multiple staff members and all clients.

# [RESULTS]

## [No more missed appointments]

Jeffrey Katz summarized Apptoto's value saying, "The solution hit it out of the park - our clients perceive our firm as accesssible, committed, showing genuine concern for their well being, and respect for their time. Reminders serve as a concrete way to demonstrate these values. Clients know that the staff is concerned about them, but that the automated call or text is not being billed to them, so they appreciate it more. We message that we are on top of their file. And It happens every time, so it communicates another JDKatz value - consistency. And it sends the message: *We care.*"

> "Originally, we didn't think we could afford a reminder service, but our overall Apptoto experience has shown us that we can't afford not to have it."
>
> Jeffrey Katz, Managing Partner
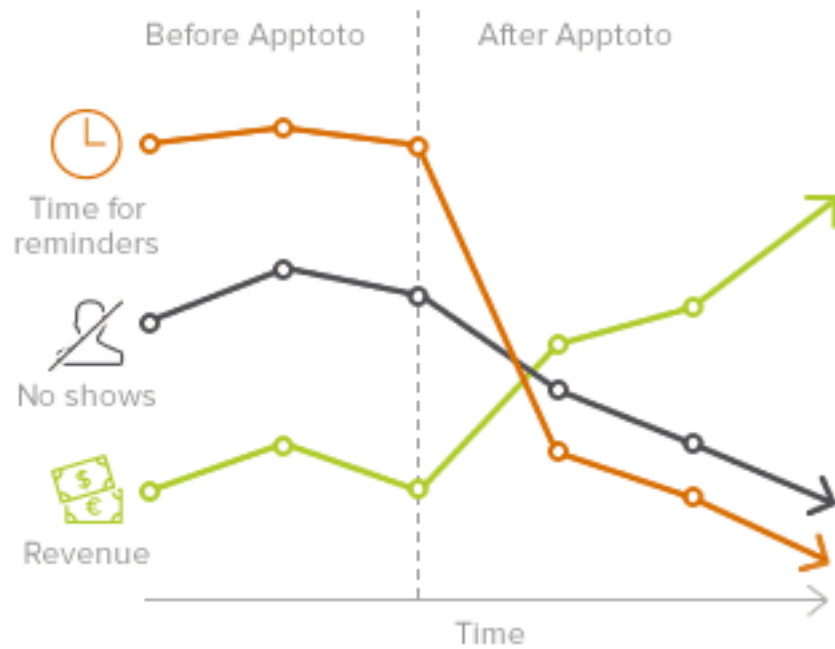> JDKatz, P.C.

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# AUTOMATED APPOINTMENT MESSAGING SERVICE

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